

# Position Management Training

## November 2016



# CI Budget & Planning - Presenter

## ➤ Jennifer Moss

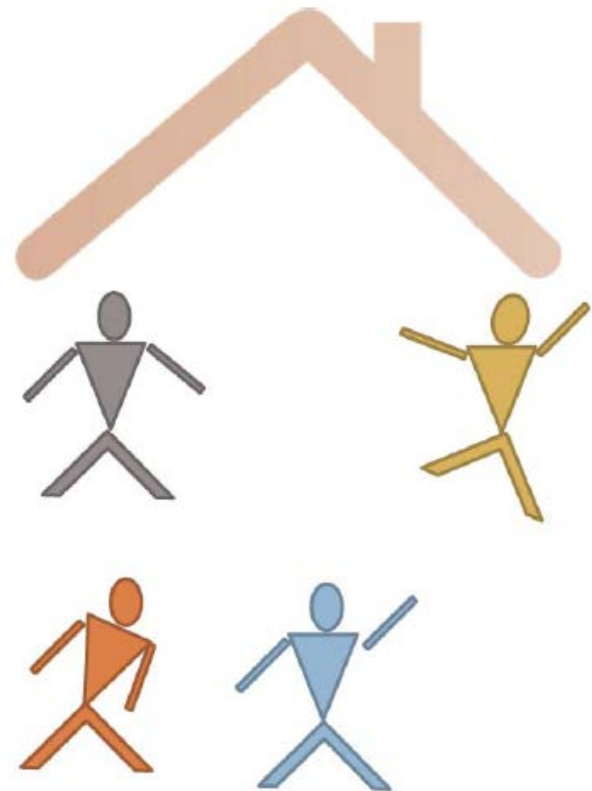
- Manager, Budget & Planning

# Objectives

- 1) Understand Position Management
- 2) Review the Position Management Action Form
- 3) Answer end user questions
- 4) Solicit feedback

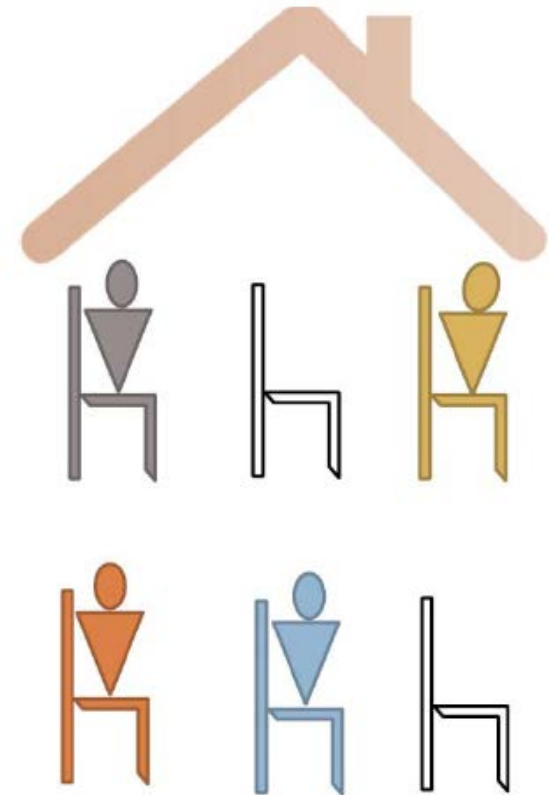
# What is Position Management?

- The roof represents a DEPARTMENT
- The figures represent the PEOPLE in the DEPARTMENT

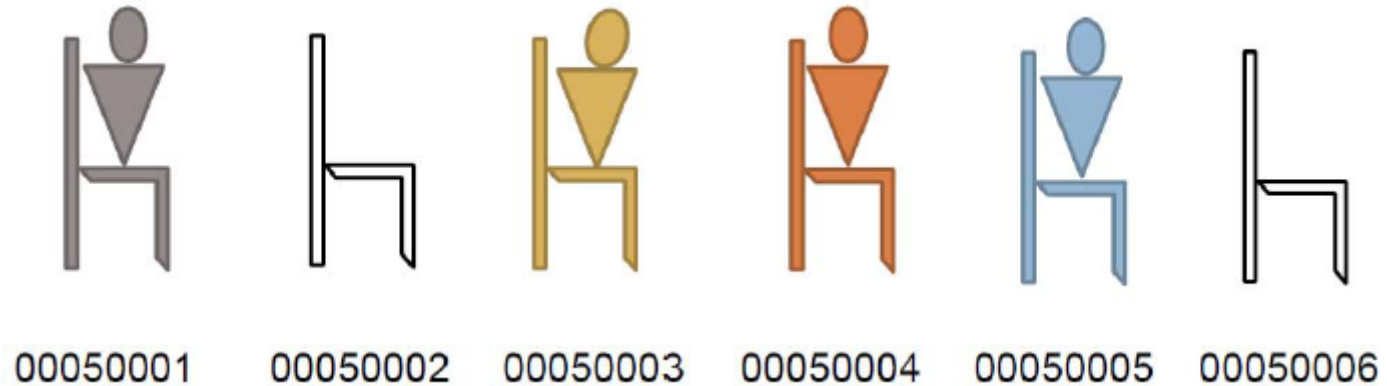


# What is Position Management?

- Let's have the PEOPLE take their seats
- The chairs represent all the POSITIONS in the DEPARTMENT



# What is Position Management?



- Position Management tracks **POSITIONS** by assigning them **POSITION NUMBERS**
- A person holding a position is an incumbent

# What is Position Management?

- Position Management coordinates three components:

**Position:**  
independent  
of an employee



Administrative  
Assistant II

**Person:**  
An employee



"Chris"

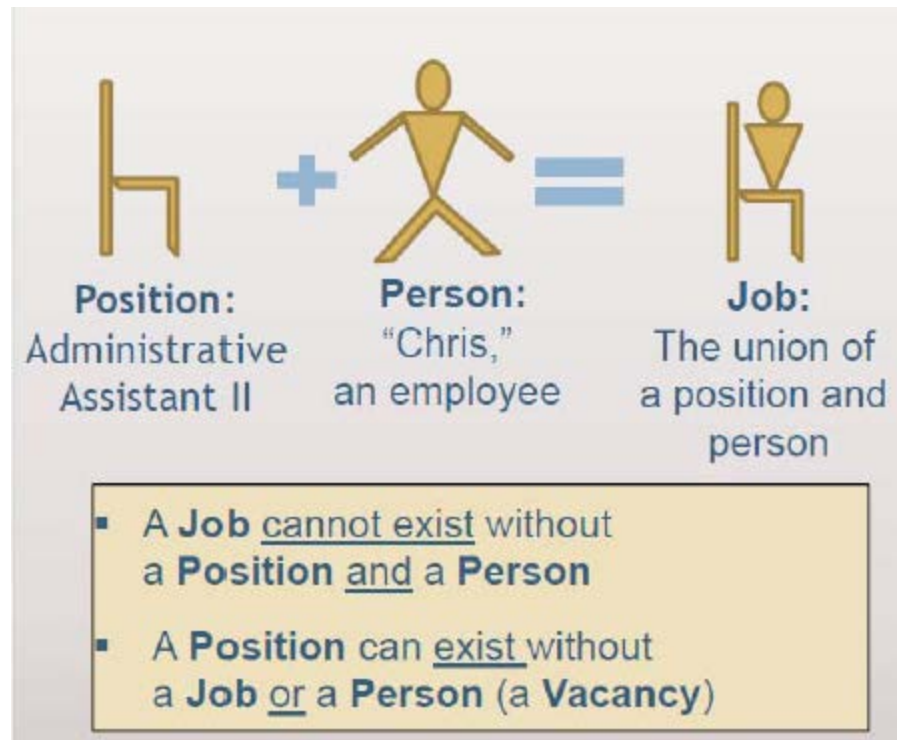
**Job:**  
The union of a  
position and person



"Chris" having the position of  
Administrative Assistant II

# What is Position Management?

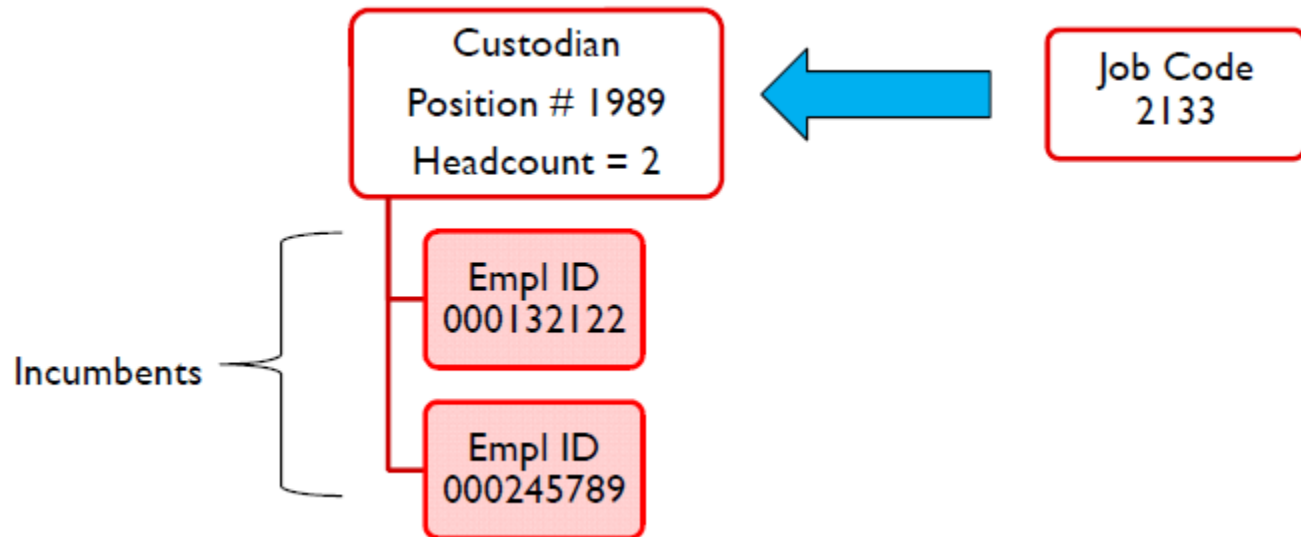
- With Position Management, a JOB is a union of the PERSON and a POSITION





# Position Management – Headcount?

- A POSITION can have multiple incumbents
- A positions HEADCOUNT indicates the planned maximum number of incumbents for a POSITION



# Headcount – Single Incumbent

- Normally, only one (1) POSITION is created for each appointment
- A unique POSITION NUMBER is required for:
  - All MPP positions
  - Most staff positions
  - All staff and faculty funded from multiple accounts (split level funding)

# Headcount – Pooled Position

- Exceptions where multiple head count positions are created:
  - Tenure Track faculty positions
  - Temporary lecturer positions
  - Student / Work-Study positions
  - Some staff positions (job codes 2322, 2323, 2356, 2357, 2362, 2363, 2365, 2457, 4660)

# Position Management Action Form



Division of  
BUSINESS &  
FINANCIAL  
AFFAIRS  
C H A N N E L  
I S L A N D S

**POSITION MANAGEMENT  
ACTION FORM**  
Budget & Planning

This form is to be used for position management actions such as:

- **Establishing a new position (Permanent or Temporary)**
  - Before requesting a new position number, please ensure there is not an existing position number available
- OR -
- **Updating or revising an existing position**
  - Updates may include changes to the Home Department ID, Funding Source, FTE, Reports to, a reclass, or the active status of a position number.

For definitions of fields, refer to the attached Quick Reference for Position Management Form.

**Contact Information**

Requestor: \_\_\_\_\_  
 Requestor's Phone: \_\_\_\_\_  
 Department & Division: \_\_\_\_\_

**Action Requested**

New     UPD     JRC     ICP     TTL

Position #: \_\_\_\_\_ Empl ID (for appointment level funding): \_\_\_\_\_  
 Reason: \_\_\_\_\_ Effective Date: \_\_\_\_\_  
 Classification Title: \_\_\_\_\_ Job Code: \_\_\_\_\_  
 Working Title: \_\_\_\_\_ Grade/Range: \_\_\_\_\_  
 Time Base (example: 1.0 for full-time, 0.75 for 3/4-time, 0.5 for half-time, etc): \_\_\_\_\_  
 Department Name: \_\_\_\_\_ Home Dept. ID: \_\_\_\_\_  
 Fund Description (see Helpful Definitions below for more information):  
 GFND    CERF    TRST    HSE    PRK    LTRY    STH    RA    OTH    Unit #: \_\_\_\_\_  
 Reports to Name: \_\_\_\_\_ Reports to Position #: \_\_\_\_\_

Regular Position                       Full-Time                       Single Incumbent  
 Temporary Position                       Part-Time                       Pooled Position (Head Count: \_\_\_\_\_)

Ending Date (if Temporary): \_\_\_\_\_

Authorized Approver Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Distribution of Labor Cost (Use this section to identify funds from which this position is to be paid)**

Fund	Funding Dept ID	Program	Class	Project	Percentage to be applied

# Position Management Action Form

- A Position Management Action Form (PMAF) is the means to create or modify POSITION data
  - Departments submit completed PMAFs to the appropriate signature authority
  - Signed PMAFs are then submitted to [BudgetOfficeForms@csuci.edu](mailto:BudgetOfficeForms@csuci.edu)

# Position Management Action Form

- Creating New Positions or Backfilling Existing Positions
  - A Position Management Action Form (PMAF) is needed for a:
    - Vacancy
    - New temporary position

**NOTE:** New, regular positions are only approved through the budget process

# Position Management Action Form

- Updating Existing Positions
  - A Position Management Action Form (PMAF) is needed for a change in:
    - Job Code
    - Grade/Range
    - Time base
    - Home Dept ID #
    - Unit #
    - Working Title
    - Reports to Position #
    - Funding (Distribution of Labor Cost)

# Position Management Action Form

- General Guidelines
  - For all position actions, please provide only those data fields that are **NEW** or **CHANGING**
  - The effective date for a position action is generally the first day of the current month (however in some situations, a retroactive date is necessary)



# Position Management Action Form

- General Guidelines, continued...
  - Submit PMAFs electronically to [BudgetOfficeForms@csuci.edu](mailto:BudgetOfficeForms@csuci.edu)
  - Submit PMAFs by the 25<sup>th</sup> of the month for actions to be active in the month submitted

# Questions / Feedback

- Budget & Planning website:  
<http://www.csuci.edu/budget/>
- Jennifer Moss  
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